

**DATASHEET**

# Claims Indexing

Roots AI Agents remove manual document processing work that slows your people down, incurs errors and drives poor customer experience.

**90%**

of inbound documents handled automatically for a global insurance conglomerate

**85%+**

capacity increase for claims team in a large insurance carrier

**90%**

reduction in claims document average handling time for a national insurer

## Intelligent Document Processing

Document classification and indexing are important steps in setting up a claim, responding to an FNOL or FROI and ongoing claims handling.

Document types vary from structured forms (e.g. ACORD, UB-04, CMS-1500 etc) to completely unstructured documents (e.g. demand letters, policy documents, general correspondence, etc).

Many claims teams are still wrestling with manually processing these documents, impacting efficiency and effectiveness of claims management as a whole.

### Challenges include:



Document volume combined with variability often results in highly skilled claims professionals spending over 30% of their time receiving and manually reviewing documents



Classification and indexing is often handled in the adjuster's spare time which can lead to process inefficiencies



Seasonal events, such as CAT season, often result in large volume spikes that exceed the existing team's capacity, requiring organizations to turn to temp labor

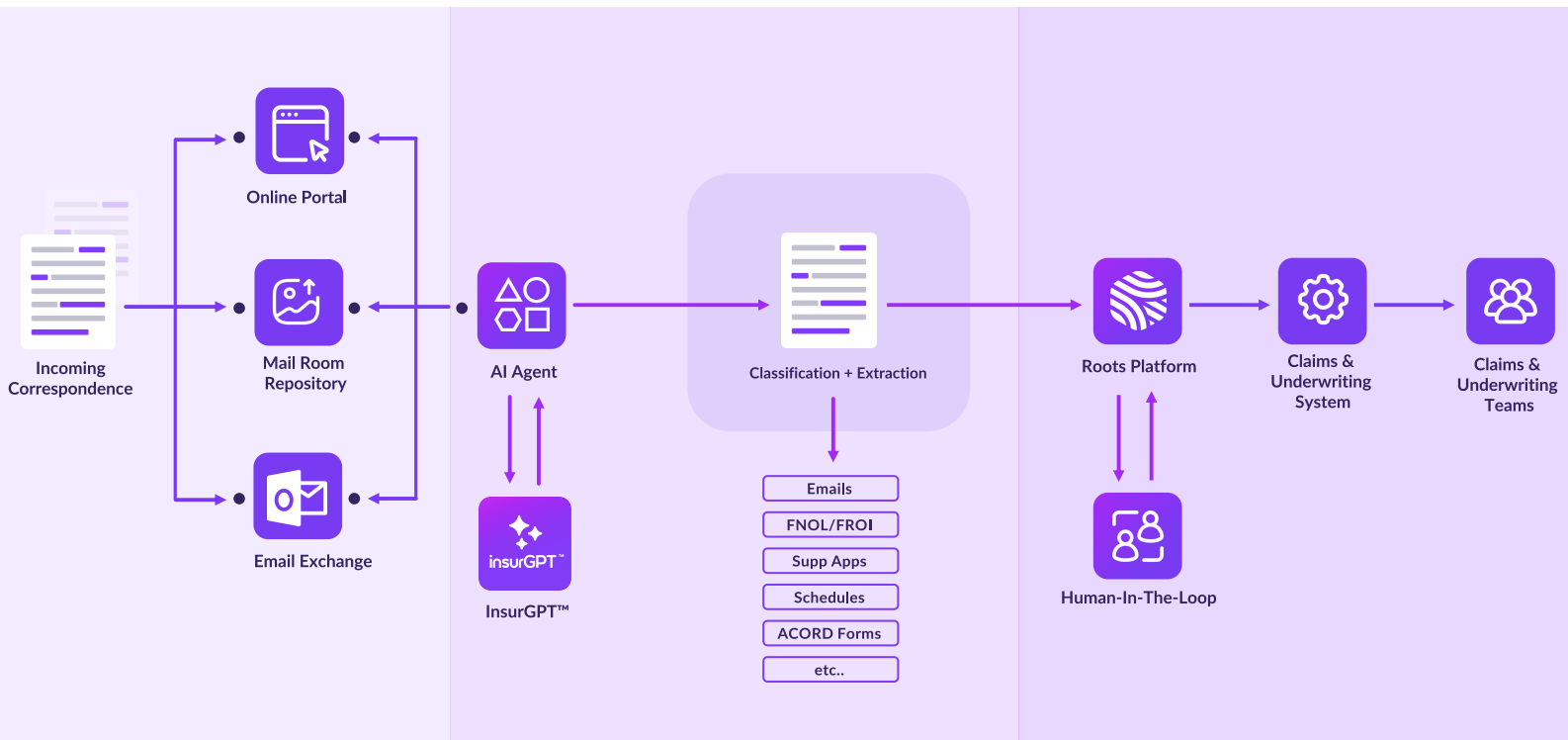
## BENEFITS

Roots AI Agents come pre-packed with skills, knowledge and capabilities to effectively manage your document classification and indexing needs.

- ✓ Enable straight-through processing for FNOL, FROI and ongoing claims handling
- ✓ Significantly improved document processing times
- ✓ Documents can be processed 365 days a year
- ✓ Higher accuracy and better quality data processing
- ✓ Reduce reliance on third parties to manage documents

# Claims Indexing

See how we reimagine document classification and indexing for claims teams



## 1 Receive

### Monitor

Watch email inboxes, attachments, mailrooms, or online systems automatically for new claims correspondence

## 2 Process

### Document Splitting

Document packages are automatically pulled for analysis, classification, and split into individual document types

### Classification

Document packages are automatically pulled for analysis, classification, and split into individual document types

### Classification Exceptions

If a document does not meet the customizable classification accuracy thresholds the system notifies a team member for manual review and stores that classification for future reference

## 3 Analyze

### Routing to Team

Documents are routed to claims, subrogation, or servicing teams for manual processing based on customizable rules

### Routing to File Storage

Duplicate documents or ones that do not need to be reviewed can be automatically routed to the correct storage system

### Routing to Extraction

Claims documents that need to have data extracted are automatically processed with the data output delivered to the correct system